

## **Session SU317**

# **Taking Performance Consulting to the Next Level: The Strategic Partner Role**

**Sunday, June 3, 2007  
1:45 – 3:00 PM**

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### **Learning Objectives:**

Following participation in this session, you will be able to:

1. Use ACT as a guide to develop access, create credibility and build trust with business managers.
  2. Analyze your current accountabilities compared to those of a strategic partner.
  3. Assess the readiness of you and the organization to transition to a strategic partner role.
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When in the **Performance Consultant** role, the consultant partners with managers for the purpose of optimizing workplace performance in support of business goals.

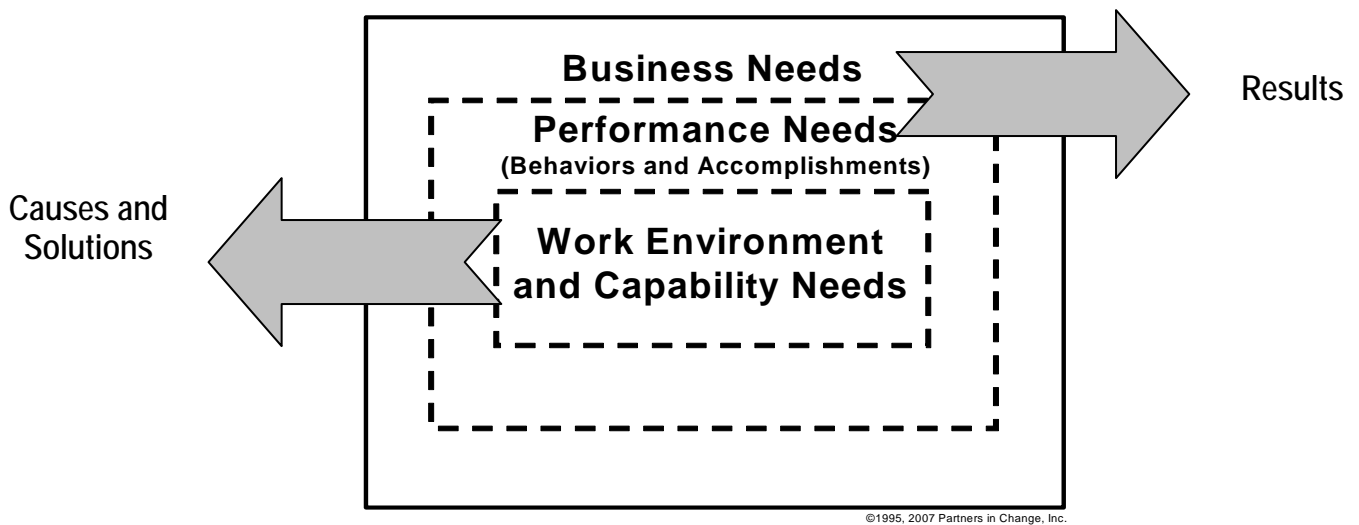
When in the **Strategic Partner** role, the consultant partners with the organization's leaders to define, align and implement people initiatives that optimize organization capacity and business results.

## **Questions**

What are the similarities between the Performance Consultant role and Strategic Partner role?

What are the differences between the Performance Consultant role and Strategic Partner role?

## *The Need Hierarchy*



### **Results**

- **BUSINESS NEEDS** are the operational and/or strategic goals for a unit, department or organization. They are expressed in operational terms and are measured in numbers.
- **PERFORMANCE NEEDS** are the on-the-job behaviors and accomplishments of people who are performing a specific job. These needs describe the results people need to accomplish through their day-to-day performance if business needs are to be met. They also describe the best practices by which these results are produced; performance needs are measured behaviorally.

### **Causes and Solutions**

- **WORK ENVIRONMENT NEEDS** identify any organizational systems and processes that are needed if the desired performance is to be achieved.

Examples of Work Environment Solutions:

- Compensation Systems
- Redesigned Work Processes
- Redefined Roles and Responsibilities
- Information Systems or Equipment
- Coaching Systems

- **CAPABILITY NEEDS** identify skill, knowledge and attributes (i.e., competencies) required of people if they are to perform successfully. Capability needs also include job match and inherent ability.

Examples of Capability Solutions:

- Learning Solutions
- Selection and Promotion Practices

## Solutions or Results?

What is the manager expressing? Focus only on the needs in the statement. Do not make assumptions about other factors. There could be more than one need being identified. Please indicate your answer by placing a check (✓) in the appropriate box(es) next to each statement, using the following codes?

BN = Business Need  
 PN = Performance Need  
 WN/S= Work Environment Need/Solutions  
 CN/S = Capability Need/Solutions

	Results		Causes/ Solutions		
	BN	PN	WN/S	CN/S	
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>We need to develop the skills of our Product and Test Engineers in how to program the new tool that has just been approved.</i>
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Our Supervisors are not managing employee work assignments effectively.</i>
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Team members indicate that the cash incentives reward individuals, but do not encourage teamwork.</i>
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>For the X2000 product to be successful, we must have 25 percent market share within two years. What can we do to build the knowledge of our Account Managers about this product?</i>

## GAPS! Map

Business Need: \_\_\_\_\_ Employee Group: \_\_\_\_\_

Client: \_\_\_\_\_

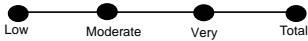
# G

**Business SHOULDs**

**Performance SHOULDs**  
(Accomplishments and Behaviors)

**Go for the SHOULD**

Confidence with Information



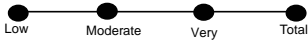
# A

**Business IS**

**Performance IS**  
(Accomplishments and Behaviors)

**Analyze the IS**

Confidence with Information



# P

**Factors External to Organization**

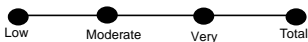
**Factors Internal to Organization**  
(Work Environment Needs)

**Factors Internal to Individuals**  
(Capability Needs)

Outside Client's Control | Inside Client's Control

**Pin Down the CAUSES**

Confidence with Information

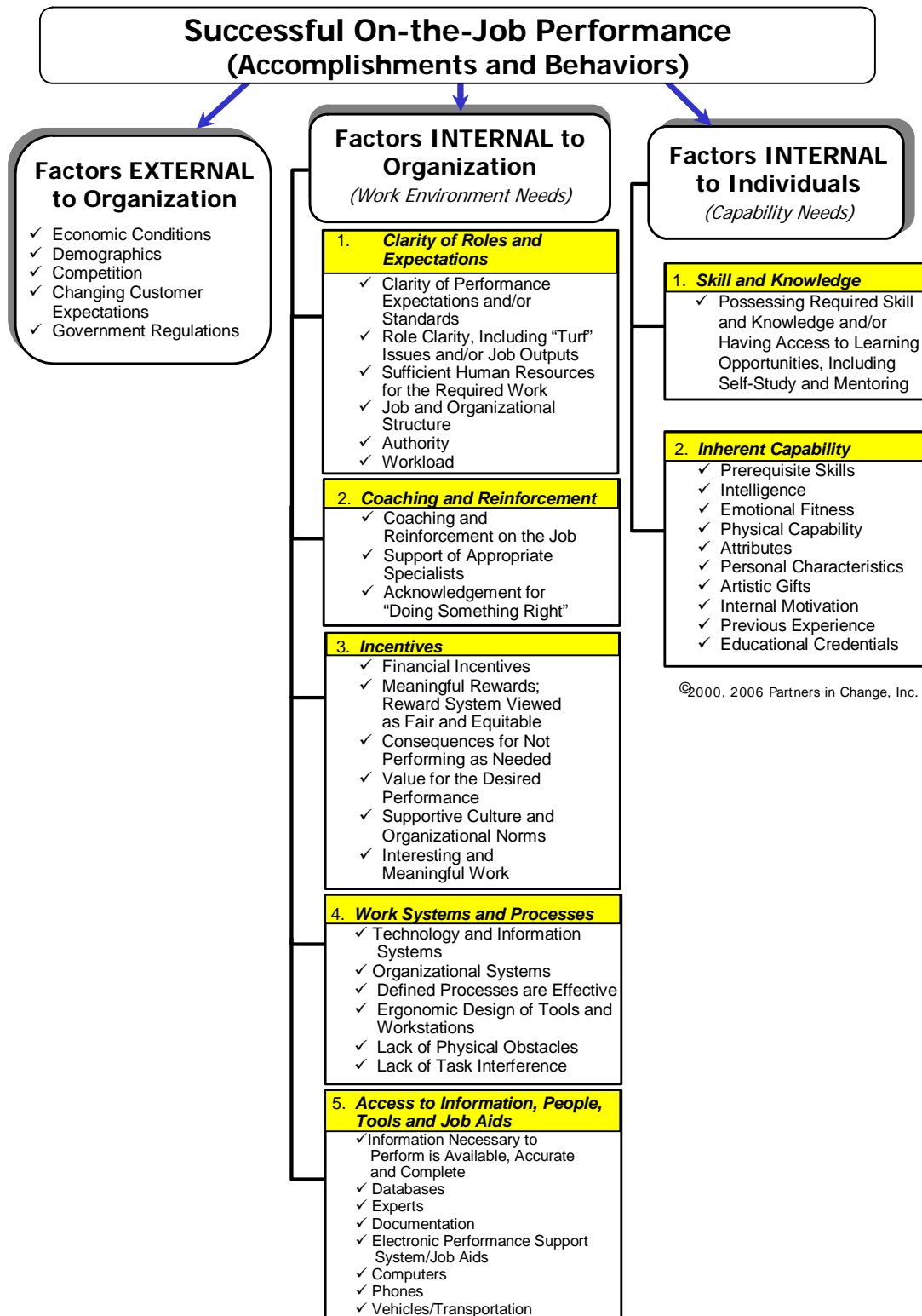


# S

**Select the Right SOLUTIONS**

## The Unabridged Gap Zapper

### Providing Examples of Root Causes within Each Category



**NOTE:** These are stated as enablers. The goal is to determine factors relevant to a specific business goal and operating as either enablers or barriers.

## ***Clients, Client Teams, Contacts***

### **CLIENT**

- Owns the business and performance needs.
- Has the most to gain or lose from these needs being addressed.
- Has the authority to make and implement decisions and solutions associated with these needs.
- Can obtain the needed resources for solutions to be implemented.

### **A CLIENT TEAM**

A client for any project may be more than one person. In addition to the person who owns the business and performance needs, there may be others who provide essential resources and have something to gain from the project. The total team has these characteristics:

- The owner of the business and performance needs is on the team.
- Someone who is within the chain of command of the employee group is on the team.
- The individual who must legitimize the project to others (particularly the employees) is on the team.
- Some or all of the client team members are two or more levels above the employee group.

### **CONTACT**

Frequently, the person who calls to request support is a contact and not a true client. While this person may have authority over the solution that is requested, a contact does not “own” the business and performance needs that are being supported. Often a contact becomes part of the client team.

## ***The ACT Approach to Partnering with Clients***

### **Gaining ACCESS—Identifying and gaining “face” time with those individuals who are owners of business and performance needs within the organization supported.**

- Build relationships with each individual and not with people as a group.
- Initiate contact with clients to discuss the business goals and challenges of the client.
- Ask questions that expand the thinking of clients.
- Respond to requests (even small ones) and deliver in excess of expectations.  
*“Be humble enough to do those things that are needed.”*
- Serve on high-visibility projects that are important to the business leader.

### **Building CREDIBILITY—Your client’s confidence in your capability to deliver results to the business.**

- Start with the mindset of the client when responding to requests.
- Evidence *deep* knowledge of:
  - ✓ The “business of the business(es)” you support.
  - ✓ The industry in which the business operates.
  - ✓ Your function’s processes and solutions.
- Deliver on commitments made to clients.
- Present proposed plans with a clear financial business case, indicating integration of plan to the current/future requirements of the business.
- “Connect the dots” within, and across, business units.  
*“I talk about initiatives occurring in another part of the business and raise questions about the implications of those initiatives for this business I am supporting.”*
- In business meetings, offer suggestions and input that goes beyond a strictly functional perspective.  
*“Think and act outside my area of responsibility.”*
- Verbally and behaviorally demonstrate belief that you share accountability for business and performance results, not just for the quality of the solutions.
- Be objective in discussions with clients; present your point of view with objective facts and by acknowledging the multiple points of view upon which your perspective is based.
- Push back when the client’s preferred action is inappropriate.

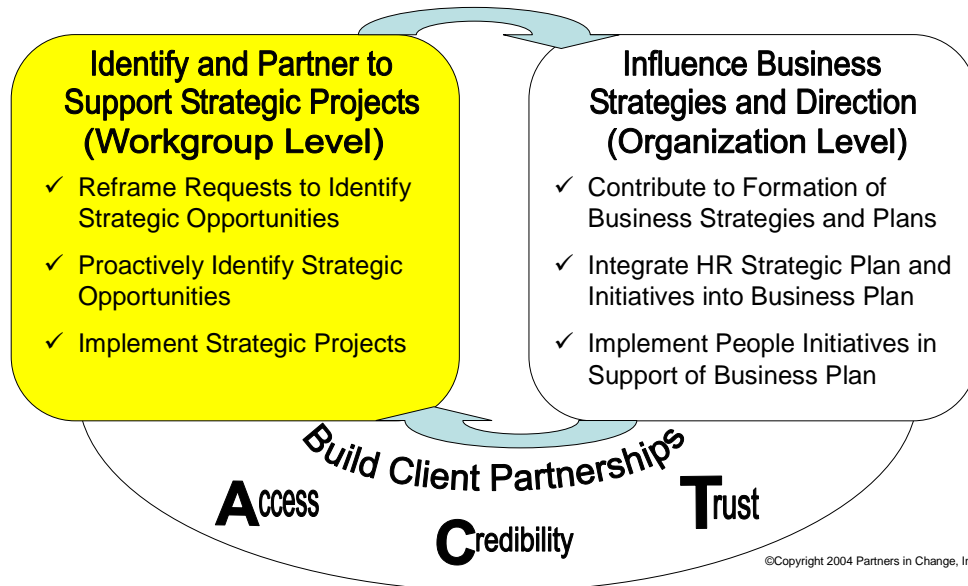
### **Building TRUST—Your client’s confidence in your integrity and reliability to achieve results in support of the business.**

- Maintain confidences.
- Accept accountability for your own actions and the results from those actions.
- Avoid blaming others.  
*“It is vital that I not finger point to others when there are problems but focus on lessons learned and what can be done to fix the situation.”*
- Act in support of the culture.  
*“I try to be a model of our culture’s values and norms.”*
- Ensure purposes for what you do are “transparent” and are focused on the shared goals for the business—there are no “hidden agendas.”
- Deliver on commitments you make to others.
- Use direct communication with clients.  
*“When I have a problem with a client, I talk directly with that individual. I avoid discussing the problem with others.”*
- Focus attention on the pressing needs of the client.
- Act in a manner where your words and your actions are congruent.

***Performance Consultant and Strategic Partner Roles Are Similar in That They:***

- Focus on results, not just solutions.
  
- Use a systematic approach based upon Need Hierarchy and SHOULD-IS-CAUSE logic.
  
- Select and implement multiple solutions, based upon root causes.
  
- Use an ACT (Act, Credibility and Trust) approach when consulting with clients.

## Performance Consultant Role



### Workgroup Level

- The ultimate goal of the client is to optimize and sustain the on-the-job performance of workgroup(s) in support of business goals.
- The group can be few in number, or there can be hundreds, even thousands, of employees in the group. While the size of the group can vary, what is the same is that people in the group share a common role or job (such as Department Managers, Customer Service Representatives, Service Technicians).
- The consultant uses tools to assess workgroup performance.

#### Examples of Requests at the Workgroup Level

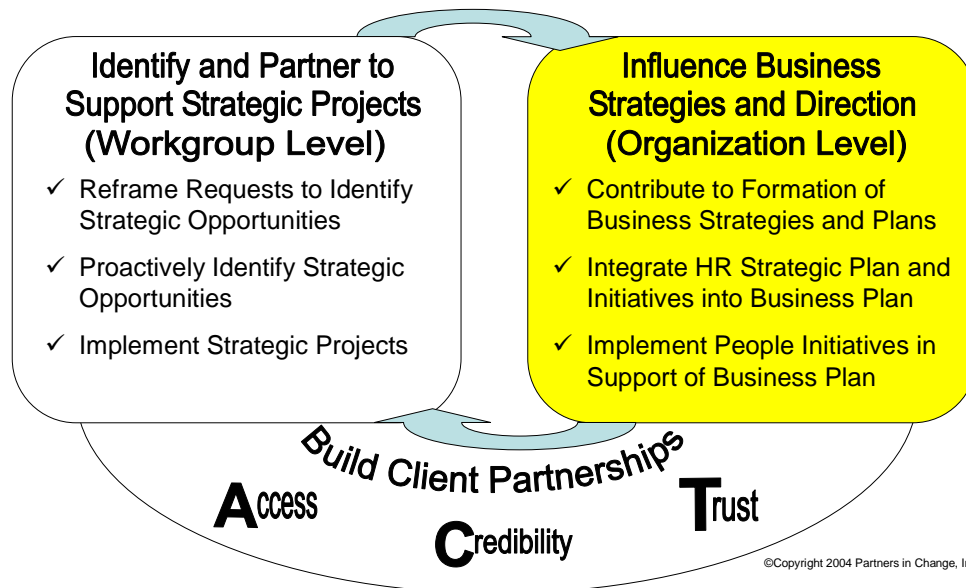
- *“We are moving to a team-based sales approach. I’d like to discuss the compensation plan we’ll need to support this approach.”*
- *“My managers are not doing career planning with their employees. I’d like your help in creating a career planning tool they can use.”*

### Workgroup Level—Project Clients

In the Performance Consultant role, consultants typically work with managers on a project basis to optimize the performance of workgroups in support of business goals. These Project Clients are typically mid-level managers with titles of manager, department head and director.

**TIP:** To accomplish this accountability, the Performance Consultant asks SHOULD-IS-CAUSE questions about workgroup performance (behavior) and business results.

## Strategic Partner Role



### Organization Level

- The ultimate goal of the client is to optimize the capacity of the organization to achieve its business goals and implement its business strategies and plans. The organization may be a department, function, division, or business.
- Typically there are multiple workgroups within the organization that will be impacted by the changes.
- The consultant uses tools to assess the organization's capacity to achieve strategic goals.

#### Examples of Requests at the Organization Level

- *"I need to get greater risk tolerance and creativity into my division."*
- *"We need to strive for increased sustainability of managers at all levels."*
- *"We need to increase our plant production by 8% this quarter."*

### Organization Level—Sustained Clients

In the Strategic Partner role, consultants typically work with business leaders on a sustained basis to optimize the organization's capacity to achieve business goals and strategies. These Sustained Clients are typically business leaders in the upper levels of the organization.

**TIP:** In this accountability the Strategic Partner asks questions about the organization's capacity to achieve its business goals.

## Starter Questions About Workgroup Performance and Business Goals

Element	SHOULD Questions	IS Questions	CAUSE Questions
<b>Business</b>	<ul style="list-style-type: none"> <li>▪ What are the goals for your business/ organization?</li> <li>▪ What are the metrics that need to be achieved?</li> <li>▪ Is there any region or group achieving the goals now? What are they doing differently to contribute to these results?</li> </ul>	<ul style="list-style-type: none"> <li>▪ What are the current results for your business/ organization?</li> <li>▪ What are the actual results of the region/group?</li> </ul>	<ul style="list-style-type: none"> <li>▪ What are the reasons for the gap between your goals and your current results?</li> </ul>
<b>Performance (Behaviors)</b>	<ul style="list-style-type: none"> <li>▪ If the goals are to be achieved, what on-the-job performance is required of (<i>name of workgroup</i>)?</li> <li>▪ If there are star employees, what do they do more, better or differently to achieve these goals?</li> </ul>	<ul style="list-style-type: none"> <li>▪ What do the employees in the workgroup typically do?</li> <li>▪ What have you observed that leads you to believe people will benefit from (<i>the solution that has been mentioned</i>)?</li> </ul>	<ul style="list-style-type: none"> <li>▪ What are the reasons for the gap between what employees should be doing and what they are doing?</li> <li>▪ If the (<i>solution suggested</i>) were implemented, what other reasons might still make it difficult for people to perform as needed?</li> <li>▪ How do the capabilities of the employees compare to the requirements of the job?</li> <li>▪ What skills and knowledge do employees require if they are to perform successfully?</li> </ul>

## Starter Questions About Organization Capacity

Element	SHOULD Questions	IS Questions	CAUSE Questions
<b>Strategy</b>	How does the focus of our strategy need to change? What will be the value proposition for our organization in the future?	What part(s) of our strategy are insufficient for what we require in the future? What is working, not working with our current strategy?	What is challenging successful execution of our current strategy? What barriers and challenges should we anticipate as we move ahead to implement our new strategy?
<b>Structure</b>	Currently, our structure is designed around ( <i>fill in the focus such as function/ geography</i> ). How will it need to change going forward? What changes in our structure do you think are needed to better support the strategy and goals we have identified?	What are the most common points of friction between groups now? What components of the current structure are working as needed and should be retained?	What is causing the friction between groups that you have indicated currently exists? Considering the changes we will be making in structure, what challenges (if any) do you anticipate we may encounter that could impact success of this structure?
<b>Processes</b>	What information technology systems will be required for our future success? In what ways will our ( <i>name of a process</i> ) need to change to fully support our new strategy?	How are decisions that focus on business goals and strategies made? How is information and knowledge shared across the organization?	Why are our technological systems, and the databases within it, not current with our needs? Why is our ( <i>name of process</i> ) not producing required outputs in an efficient manner?
<b>People Practices and Systems</b>	What are the deliverables we seek from a new performance management system? Given our business goals for the next five years, what are the key competencies we need to have more of? Less of?	In what parts of our organization are we facing the greatest risk of losing key talent? How prepared are our employees to perform as needed in the future?	Why is our on-boarding process not succeeding? What challenges do we face as we work to strengthen the match between competencies we currently have and those we will need in the future?

**NOTE:** When exploring organizational needs, questions about business goals are still required.

## ***Performance Consultant and Strategic Partner Roles Are Similar in That They:***

- Focus on results, not just solutions.
- Use a systematic approach based upon Need Hierarchy and SHOULD-IS-CAUSE logic.
- Select and implement multiple solutions, based upon root causes.
- Use an ACT (Act, Credibility and Trust) approach when consulting with clients.

## ***The Roles Are Different in That:***

### *In the Performance Consultant Role:*

1. Consultants focus on optimizing the performance (behaviors and accomplishments) of people in workgroups.
2. Consultants partner with project clients. As Performance Consultants they use the ACT approach to develop a partnership with the client during the life of the project.
3. Within organizations, consultants are frequently in a specialist role (i.e., learning professional); in this role they design and implement some of the solutions required to address a need.

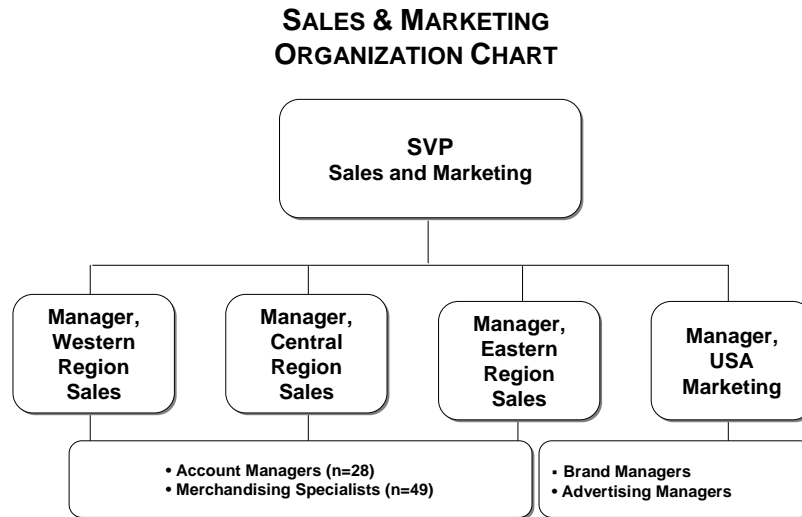
### *In the Strategic Partner Role:*

1. Consultants, in addition to addressing workgroup needs, partner with clients to optimize capacity of an organization to perform.
2. Consultants work with both project and sustained clients. As Strategic Partners they devote a significant amount of time to both develop and maintain sustained partnerships.
3. Consultants are usually operating in a generalist role; when solutions are required, they broker the resources needed to provide these solutions.

## **Exercise #1**

### **Sales and Marketing**

You support the Senior Vice President (SVP) of Sales & Marketing of an organization that manufactures and sells consumer products. The organization chart for this group is noted below. There are approximately 100 employees in this group.



Today you received a request from the SVP, Sales & Marketing asking that you investigate a program offered by Edward deBono's organization in the area of creativity. The program is entitled "Lateral Thinking" and helps people to problem solve and take a more creative approach to problem solving. Your client wants to enhance the innovative and creative thinking that is done within the entire Sales and Marketing Group. This client is frustrated because this group is not meeting its goals in either revenue or profit. He believes that people keep using the same approaches to go to market they have used in the past. These are approaches that may have worked in the past, but will not be successful in a marketplace that is becoming increasingly segmented and competitive.

### **Small Group Exercise**

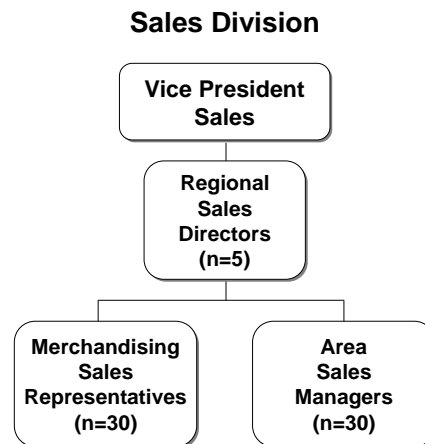
1. Which approach would you use?
  - Performance Consulting
  - Strategic Business Partnering
  
2. What is your rationale for selecting that approach?

## **Exercise #2**

### **Sales Team**

You support the VP–Sales of an organization that manufactures and sells building materials. These materials are sold through retail home improvement stores and lumberyards. Four months ago, the sales function was reorganized. New sales teams were created. Each team consists of:

- Area Sales Manager (ASM)—responsible for relationship with retailers, creating the sales strategy and merchandising plans for major retailers, and communicating the sales strategy and merchandising plans to others within the manufacturing organization.
- Merchandising Sales Representatives (MSR)—responsible for merchandising retail stores and helping retailers introduce new products.



The VP–Sales has called you because she wants to have some type of team-building experience for MSRs and ASMs. Recently, she was in the field and heard a great deal of complaints from the MSRs that the ASMs are not keeping them “in the loop.” In fact many times, the ASMs email directions to the MSRs without information about the big picture or rationale. The regional sales director from the South Central Region with whom she spoke reinforced this observation. The VP is feeling some urgency and would like to begin the team-building experience as soon as possible. Her thoughts are to have one team-building workshop within each region; therefore, five team-building workshops will be required.

### **Small Group Exercise**

1. Which approach would you use?
  - Performance Consulting
  - Strategic Business Partnering
2. What is your rationale for selecting that approach?

# Assessment of Readiness to Transition to Strategic Partner

## Section One: Competencies and Attributes

The following competencies have been identified as required for success as a strategic partner.

**Technical/Process Competence.** Competencies where skill and knowledge can be developed.

**Attributes.** Characteristics or traits which are difficult to develop.

Rating Key	
<b>Proficient</b>	I consistently demonstrate skill while managing routine, unique and difficult situations.
<b>Adequate</b>	I demonstrate skill in routine situations, but require coaching on how to apply the competency in unique and/or difficult situations.
<b>Basic</b>	I have only foundation skills in this area.

	LEVEL OF COMPETENCE		
	Proficient	Adequate	Basic
<b>TECHNICAL/PROCESS COMPETENCE (SKILLS AND KNOWLEDGE)</b>			
1. <b>Analysis Skill:</b> Obtain, synthesize, and report data (both narrative and quantitative).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. <b>Business Knowledge:</b> Knowledge of how businesses function and achieve success; knowledge of these factors for the organization(s) specifically being supported.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. <b>Change Management Skill:</b> Guide others to identify and take required actions in support of a performance change initiative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. <b>Facilitation Skill:</b> Manage meetings and group processes to ensure that the objectives of the group are achieved.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. <b>HR Systems and Process Knowledge:</b> Knowledge of multiple HR interventions and systems that can be utilized as solutions when addressing human performance needs relative to business goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. <b>Human Performance Technology (HPT) Understanding:</b> Knowledge of HPT as a discipline, as well as knowledge of the work of those who are its primary leaders and thinkers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. <b>Influencing Skill:</b> Gain acceptance of an idea through interpersonal skills and persuasion.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. <b>Project Management Skill:</b> Plan, organize, and monitor work done by others in support of a specific project or assignment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. <b>Questioning Skill:</b> Gather information through the process of interviews and other probing methods.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. <b>Relationship-Building Skill:</b> Establish and maintain collaborative partnerships with individuals across a broad range of people and groups.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. <b>Strategic Thinking Skill:</b> Obtain information and identify key issues and requirements relevant to achieving an organization's long-range goal or vision.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. <b>Systemic Thinking Skill:</b> View the organization as a system, recognizing that the success of the whole is dependent upon the integration, understanding, and inclusion of all segments; consider the big picture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. <b>Technological Skill:</b> Identify areas in which information technology can improve employee productivity and/or customer service; select appropriate software solutions; utilize HR and business software in one's own job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Assessment of Readiness to Transition to Strategic Partner

## Section One: Competencies and Attributes

ATTRIBUTES (CHARACTERISTICS OR TRAITS)	LEVEL OF COMPETENCE		
	Proficient	Adequate	Basic
14. <b>Behavioral Flexibility:</b> Readiness to modify approach or performance when the situation requires it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. <b>Objectivity:</b> Maintain a bias-free approach to situations and people.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. <b>Self-Confidence:</b> Manage own performance in an effective manner when placed in new and/or challenging situations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. <b>Tolerance for Ambiguity:</b> Demonstrate comfort in situations where the goal and/or process to achieve goals are unclear and difficult to determine.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Section Two: Organization Factors

This is a partial list of factors within an HR/Learning organization that can affect your transition into the role of a strategic partner. Using the following rating key, indicate with a checkmark how each factor impacts upon your effectiveness as a strategic partner.

Rating Key	
<b>This Factor Supports Me</b>	The factor is present, and I find it supportive of my work as a strategic partner.
<b>This Factor Neither Supports Nor Challenges Me</b>	Whether the factor is or is not present, I find it having minimal impact upon me as a strategic partner.
<b>This Factor Challenges Me</b>	The factor is not present, and that is a problem for my work as a strategic partner.

ORGANIZATION FACTORS	This Factor supports Me	This Factor Neither Supports Nor Challenges Me	This Factor Challenges Me
18. An HR/Learning workflow process has been formed for identifying and completing strategic projects.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. The HR/Learning workflow process for strategic projects has been communicated to and is understood by those who support the process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. My transactional work is being reduced through outsourcing, use of vendors, or other means.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Support for tactical work is available from Centers of Excellence, external suppliers and/or other resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. As a strategic partner I have been assigned to support specific business units, functions, and/or the enterprise itself.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Specific HR/Learning professionals are responsible for specific steps in the HR/Learning workflow process for strategic projects; respective roles are clear.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. For strategic work, I am rewarded based upon the feedback from my clients and my contribution to business results.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. I receive coaching in those competencies and activities where I need development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>